



The NC E-Procurement eQuote tool allows users to request pricing on goods and services from one or more suppliers quickly and efficiently. eQuote functions much like a punchout session in NC E-Procurement (see the **'eRequisition Punchout Item'** job aid for more information about punchout catalogs), allowing buyers to access the site without the need for additional login information. Suppliers submit their quotes through the same eQuote tool, creating an electronic audit trail. Once a buyer has awarded items on the eQuote website, the items are automatically transferred into NC E-Procurement as line items on the eRequisition.

I. Creating eQuote Items

1. Conduct a catalog search for the eQuote punchout site. Under the **'Search'** Portlet, select **'Catalog'** and enter the word **'eQuote'** to search for the eQuote site. Alternatively, select **'Catalog'** from the **'Search'** drop-down menu of the Command Bar and enter **'eQuote'** in the **'Search'** field.

The screenshot displays the NC E-Procurement web application interface. The top navigation bar includes the logo, 'ARIBA*', 'SPEND MANAGEMENT', and user options like 'Home', 'Help', and 'Logout'. Below the navigation bar, there are tabs for 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The 'Search' portlet is active, showing a search bar with the keyword 'equote' entered. The search results are categorized into various item types, including 'AGRICULTURAL EQUIPMENT, SUPPLIES & CHEMICALS (2360)', 'APPLIANCES, ELECTRICAL, CLOCKS (12325)', 'BUILDING MATERIALS, MAINTENANCE (3576)', 'CLOTHING & TEXTILE ITEMS (1353)', 'EDUCATIONAL & ATHLETIC EQUIPMENT, SUPPLIES (103)', and 'FOOD & RELATED ITEMS (284)'. A 'News' portlet on the right provides a welcome message and a link to training resources. The 'To Do' portlet shows 'No items'.



- The 'eQuote Punchout Site' link will appear in the green 'Supplier Punchout Catalog Resources' box. Click the link to punch out to the eQuote site.

The screenshot displays the NCE-Procurement eRequisition interface. At the top, the logo and navigation links are visible. The main content area shows a search for 'equote' within a requisition. The search results are filtered by 'Supplier Punchout Catalog Resources', and the 'eQuote Punchout Site' link is highlighted with a dashed circle. The interface includes a sidebar for refining results by keyword, category, supplier, language, and manufacturer. The main search area includes a search bar, a 'Search' button, and a 'Create Non-Catalog Item' button. The search results show 3 items found, with options to sort by relevance, price, or name, and view details or thumbnails. The 'eQuote Punchout Site' link is the primary focus of the guide.



3. The eQuote punchout site will open on the **'Create eQuote'** page.
4. Update the information in the **'Overview'** section.
 - a. The **'Initiator,' 'Date Initiated,' 'Your Requisition Number,'** and **'Ship To Address'** fields will automatically populate based on your user profile information.
 - b. The **'eQuote Title'** field will automatically populate based on the eRequisition title. If you did not add a title to the eRequisition before creating the eQuote item, the title will default to **'Untitled Requisition.'** The **'Quote Title'** field is editable on the **'Create eQuote'** page.
 - c. Set the **'eQuote Response Due,' 'FOB,'** and **'Delivery Needed By'** fields as applicable.

Note: The **'Rush Response'** box may be checked to notify vendors that a response is needed within 4 business hours. The **'Rush Delivery'** box may be checked to notify vendors that delivery will be required within 2 business days.

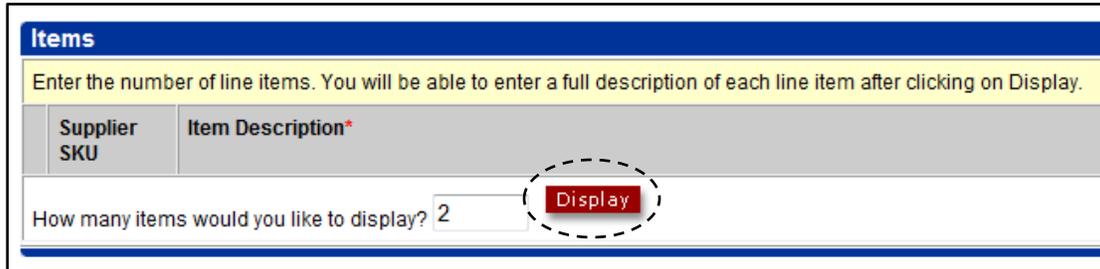
The screenshot shows the 'Create eQuote' page in the NCE-Procurement system. The page has a header with the NCE-Procurement logo and 'ARIBA* SPEND MANAGEMENT'. Below the header, there are three steps: 1. STEP 1: ENTER EQOTE INFO., 2. STEP 2: SELECT SUPPLIERS, and 3. STEP 3: REVIEW AND SUBMIT. The main content area is titled 'Overview' and contains a form with the following fields:

Initiator	State of NC - DEPARTMENT OF ADMINISTRATION		
Date Initiated	Dec 13, 2012 4:44PM		
eQuote Title*	<input type="text" value="Untitled Requisition"/>		
Your Requisition Number	<input type="text"/>		
eQuote Response Due*	December 19 2012	<input checked="" type="checkbox"/> Rush Response	(Requests that the supplier responds within 4 business hours)
Ship To Address*	123 Main St., Anytown, NC 27609		
FOB	<input type="text" value="Destination"/>		
Delivery Needed By	Month Day Year	<input checked="" type="checkbox"/> Rush Delivery	(2 business days)

A yellow callout box with the text "Check the 'Rush' boxes to indicate to the vendor the urgency of the request." has arrows pointing to the 'Rush Response' and 'Rush Delivery' checkboxes.

Note: Everything but the **'Your Requisition Number'** field will be visible to the supplier.

- In the **'Items'** section, enter the number of items for which you wish to request quotes in the **'How many items would you like to display?'** free-text field and then click the **'Display'** button.



Items

Enter the number of line items. You will be able to enter a full description of each line item after clicking on Display.

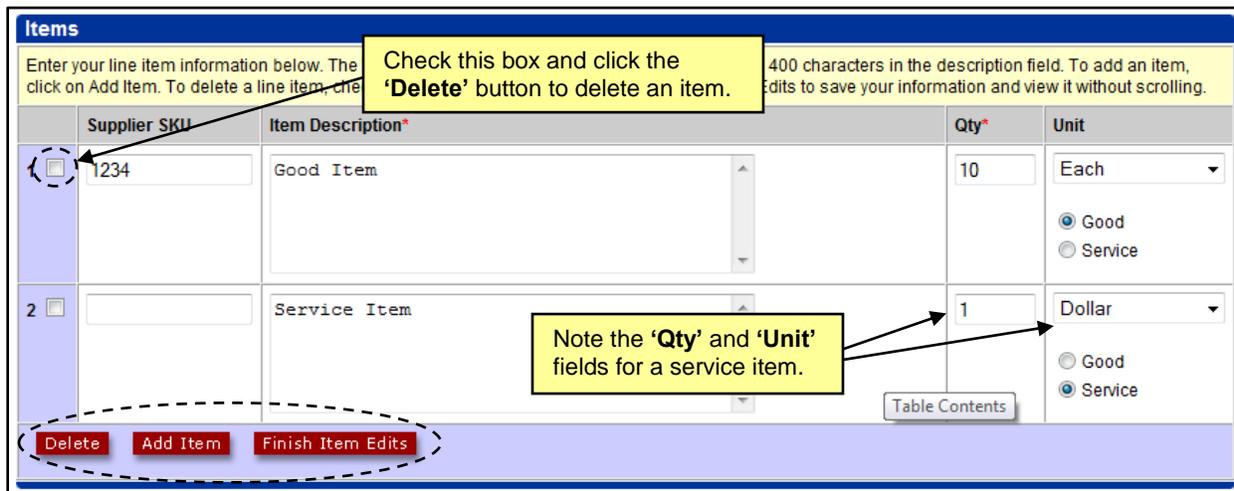
Supplier SKU	Item Description*
How many items would you like to display? 2	

Display

- The page will update with the number of items requested. If further items are needed, click the **'Add Item'** button to add more items.
 - Enter the part number (if known) into the **'Supplier SKU'** free-text field. If unknown, leave the field blank as this is an optional field.
 - Enter a description of the requested good or service in **'Item Description'** free-text field. Be sure to include as many details as possible to aid the supplier in determining their response.
 - Set the quantity in the **'Qty'** free-text field and set a unit of measure using the **'Unit'** drop-down menu.
 - Select either the **'Good'** or **'Service'** radio button to select the appropriate item type.

Note: When submitting an eQuote request for a service, the **'Unit'** field must be set to **'Dollar'** and the **'Qty'** field should be **'1.'** When the eQuote is awarded, the system will automatically set the appropriate **'Quantity,' 'Price,'** and **'Unit of Measure'** fields on the eRequisition. Do not complete the **'Supplier SKU'** field for a service item.

- Click **'Finish Item Edits'** to save the item information.
- If you wish to delete an item, check the box next to the item and click the **'Delete'** button.



Items

Enter your line item information below. The 400 characters in the description field. To add an item, click on Add Item. To delete a line item, check the checkbox and click the Delete button. To save your information and view it without scrolling.

	Supplier SKU	Item Description*	Qty*	Unit
<input checked="" type="checkbox"/>	1234	Good Item	10	Each
2 <input type="checkbox"/>		Service Item	1	Dollar

Good
 Service

Good
 Service

[Table Contents](#)

Delete **Add Item** **Finish Item Edits**

9. Once the **'Finish Item Edits'** button has been clicked, the item information will be saved and the items will appear as uneditable. To make edits to existing items, check the box next to the item and click the **'Make Edits'** button. Items can also be added and deleted at this point.

Items					
To make additional changes click on Make Edits.					
	Supplier SKU	Item Description*		Qty*	Unit
<input checked="" type="checkbox"/>	1234	Good Item		10	Each
2 <input type="checkbox"/>		Service Item		1	Dollar

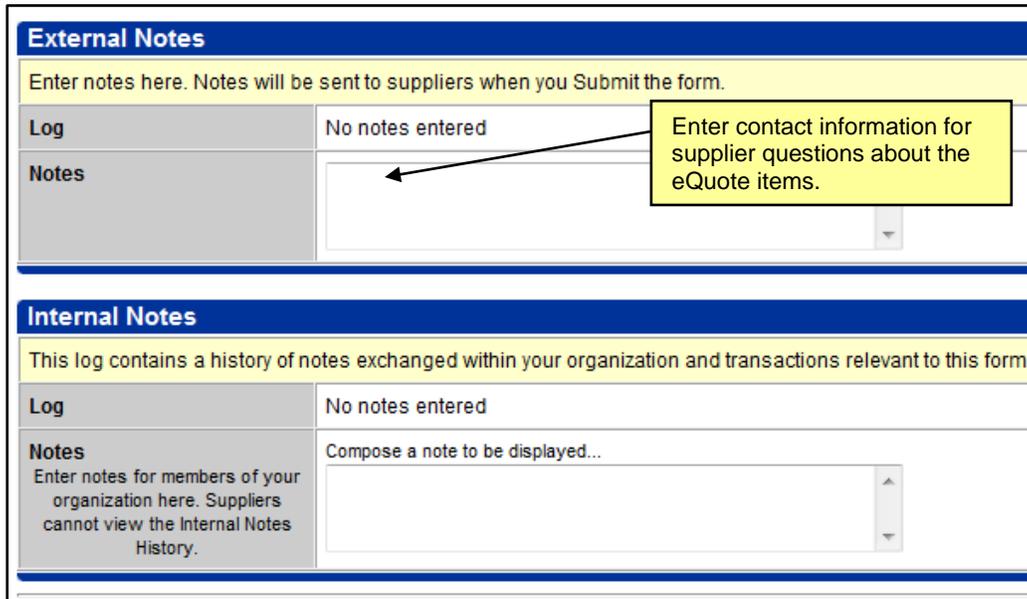
Check the box and click the **'Make Edits'** button to edit existing items.

Delete Add Item **Make Edits**

10. After adding items, continue to the **'Specifications'** section. Details under this section are optional.
- Enter any further specifications, shipping instructions, invoice requirements, etc. into the **'Additional Information'** free-text field.
 - Use the **'Substitute Products'** radio buttons to set whether suppliers will be able to offer substitutes to the requested items.
 - Click the **'Browse'** button, select a file saved on the local computer, and click **'Attach File'** to add any attachments.
 - The standard State of North Carolina eQuote Terms and Conditions will appear in the **'Terms & Conditions'** section. If your agency has further quoting terms and conditions, enter those in the free-text box at the bottom of the section.

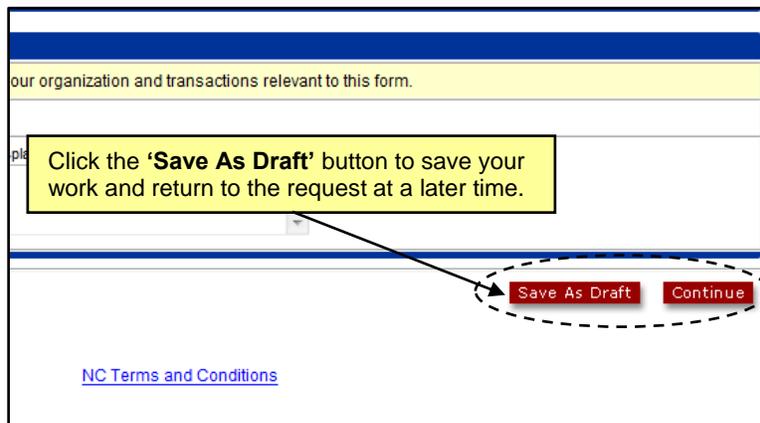
Specifications	
Additional Information Use this space for product specifications and other requirements.	<input type="text"/> Additional specifications and other comments may be entered in the 'Additional Information' free-text field.
Substitute Products Will you consider equal quality substitute products?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Attachments To attach a file, first click on the Browse button and navigate your hard drive to select the file. Then, click the Attach button. You can attach up to 2 files, with a size of 1.5MB or less each.	<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Attach File"/> No attachments Enter additional terms and conditions for your agency here.
Terms & Conditions	The State of North Carolina Terms and Conditions (T&Cs) apply to this purchase. Click here [Statewide IT Procurement] for the T&Cs applicable to purchases of information technology. Click here [Purchase and Contract] for Instructions for Quote and T&Cs applicable to all other purchases. No additional T&Cs that may be attached to your response to the eQuote will be considered. You agree that your submission of an offer using your password protected access to this system constitutes an approved signature on your offer. Please contact the purchaser if you have questions. <input type="text"/>

11. The **'External Notes'** section can be used to enter any additional notes to the suppliers, such as contact information regarding questions about the eQuote request. This section is optional.
12. The **'Internal Notes'** section will not be visible to the suppliers and may be used to track internal information for the agency. This section is optional.



The screenshot shows two sections: 'External Notes' and 'Internal Notes'. The 'External Notes' section has a 'Log' showing 'No notes entered' and a 'Notes' field with a callout box that says 'Enter contact information for supplier questions about the eQuote items.' The 'Internal Notes' section has a 'Log' showing 'No notes entered' and a 'Notes' field with the text 'Compose a note to be displayed...' and a description: 'Enter notes for members of your organization here. Suppliers cannot view the Internal Notes History.'

13. Click the **'Continue'** button to continue to the next page and select suppliers to which the request should be sent.



The screenshot shows the bottom of the page with two buttons: 'Save As Draft' and 'Continue'. A callout box points to the 'Save As Draft' button with the text: 'Click the 'Save As Draft' button to save your work and return to the request at a later time.' A dashed oval highlights both buttons. At the bottom left, there is a link for 'NC Terms and Conditions'.

Note: At the bottom-right of the page, click the **'Save As Draft'** button at any time to save the information and return to the eRequisition. Once back in the requisition, click the underlined line item description of the saved eQuote request to punch back out to eQuote and continue working on the request. Saving the draft will not send the request to any suppliers.



14. The 'Create eQuote: Select Suppliers' page will appear.
15. If the supplier from which you would like to request a quote is known, enter the supplier's name in the 'Supplier Name' free-text field and then click the 'Search' button.

1. Please enter supplier name.

Search for a Specific Supplier

Supplier Name* Test Vendor

Search

16. To search for a list of suppliers that provide the types of items or services needed, use the category drop-down menus in the 'Search for a List of Suppliers' section to select the applicable categories. Suppliers will be returned based on the options configured in their eQuote profiles.

Search for a List of Suppliers

Category Selection* Select a First Level category *Required

Second Level Category* Select a Second Level category *Required

Third Level Category* Select a Third Level category * Required

Rush Response

Set all 3 category drop-down menus to select suppliers that provide the types of items that are needed.

Search

Note: If a rush response is needed, check the 'Rush Response' box before clicking the 'Search' button. This returns only those suppliers who have indicated that they will provide rush responses.



17. Suppliers matching the search criteria will appear in the **'Supplier Search Results'** section. Check the box next to the suppliers to whom the request should be sent and click the **'Add to eQuote'** box.

Supplier Search Results

Please select the suppliers that you would like to respond to your eQuote request by clicking in the check box. Click on Add to eQuote before clicking on Continue. You can also invite a supplier you don't see listed to join the marketplace.

Name	HUB	Rush Response	City	State	County
<input checked="" type="checkbox"/> Test Vendor			Raleigh	NC	Alleghany

Items 1-1 of 1. Page 1 of 1. Display: 20 items

Suppliers Selected for eQuote

Suppliers selected to receive this eQuote are listed below. To add more suppliers and add them to the list by clicking in the check box. Click on Add to eQuote before clicking on Continue. To remove a supplier, click in the box to the left of the supplier's name and then click on Delete. To remove all selected suppliers from this eQuote, click the Delete All button.

Name	HUB	Rush Response	City	State	County
No Data Available					

Items 1-0 of 0

[NC Terms and Conditions](#)

Internet | Protected Mode: On | 100%



Note: If there is a preferred supplier that does not appear to be registered for eQuote, click the **'Invite Supplier'** box to send the supplier information on enrolling in NC E-Procurement and participating in eQuote. Enter the supplier's contact information on the **'Invite Suppliers to Join the North Carolina E-Procurement Service'** page and click the **'Submit'** button. Unless an invited supplier registers for eQuote and is manually added to the eQuote request prior to submitting, they will not be able to respond to the current request.

Invite Suppliers To Join the North Carolina E-Procurement Service	
If you have a supplier who is not currently registered to receive eQuotes, please tell us about your supplier using the form below. The supplier will be contacted with information about enrolling in the NC E-Procurement Service and participating in eQuote. Please supply a valid email address in addition to the other required information.	
Supplier Name*	<input type="text"/>
Contact Name*	<input type="text"/>
Phone*	<input type="text"/>
FAX (Optional)	<input type="text"/>
E-mail Address (*Required)	<input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Submit"/>	



18. After selecting a supplier(s) and clicking the 'Add to eQuote' button, the selected supplier(s) will appear in the 'Suppliers Selected for eQuote' section. Once all desired suppliers are added, click the 'Continue' button.

Supplier Search Results

Please select the suppliers that you would like to respond to your eQuote request by clicking in the check box. Click on Add to eQuote before clicking on Continue. You can also invite a supplier you don't see listed to join the marketplace.

	Name	HUB	Rush Response	City	State	County
<input type="checkbox"/>	Test Vendor			Raleigh	NC	Alleghany

Add To eQuote
Invite Supplier
Display: 20 items

Items 1-1 of 1. Page 1 of 1

Suppliers Selected for eQuote

Suppliers selected to receive this eQuote are listed below. To add a supplier, use one of the Search functions above, select one or more suppliers and add them to the list by clicking in the check box. Click on Add to eQuote before clicking on Continue. To remove a supplier, click in the box to the left of the supplier's name and then click on Delete. To remove all selected suppliers from this eQuote, click the Delete All button.

	Name	HUB	Rush Response	City	State	County
<input type="checkbox"/>	Test Vendor			Raleigh	NC	Alleghany

Delete All
Delete

Items 1-1 of 1

Return To Search
Save As Draft
Continue

Selected vendors may also be deleted from the request before submitting.

19. The 'Create eQuote – Review and Submit' page will appear.

Create eQuote - Review and Submit

1 STEP 1: ENTER EQUOTE INFO.
2 STEP 2: SELECT SUPPLIERS
3 STEP 3: REVIEW AND SUBMIT

Instructions

Please review your work to make sure all of the information is correct and then click on Submit at the bottom of this page. To make changes, click on Edit.

Overview

Initiator	
Date Initiated	Dec 13, 2012 4:44PM
eQuote Title	Untitled Requisition
Your Requisition Number	RQ16443426
eQuote Response Due	December 19, 2012
Ship To Address	123 Main St. Anytown NC 27609
FOB	Destination Table Contents
Delivery Needed By	No Date Specified

Items

Supplier SKU	Item Description	Qty	Unit	Classification
1234	Good Item	10	Each	Good
	Service Item	1	Dollar	Service

2/14/2014

eRequisition eQuote Item Process Guide

10



- 20. Review the information and click the **'Edit'** button to make any desired updates before submitting the request to the selected suppliers.
- 21. Click the **'Submit'** button to send the request to the suppliers and punch back into the eRequisition.

Note: Once the eQuote request has been submitted to suppliers, it cannot be edited.

Specifications	
Additional Information	
Substitute Products	Yes
Attachments	No attachments
Terms & Conditions	The State of North Carolina Terms and Conditions (T&Cs) apply to this purchase. Click here [Statewide IT Procurement] for the T&Cs applicable to purchases of information technology. Click here [Purchase and Contract] for Instructions for Quote and T&Cs applicable to all other purchases. No additional T&Cs that may be attached to your response to the eQuote will be considered. You agree that your submission of an offer using your password protected access to this system constitutes an approved signature on your offer. Please contact the purchaser if you have questions.
Selected Supplier(s)	Test Vendor ← Note the selected suppliers.

External Notes	
Notes	

Internal Notes	
Log	No notes entered
Notes	

Click the 'Edit' button to go back and make updates to the request before sending it to the suppliers.

[Edit](#) [Save As Draft](#) [Submit](#)

[NC Terms and Conditions](#)



22. Once submitted, the eQuote line item will be added to the eRequisition. Save the eRequisition and return to it after the eQuote due date (set earlier in the 'eQuote Response Due' field) to award the eQuote.

Note: The system does not prevent suppliers from submitting responses once the due date has passed. Therefore, it is the responsibility of the buyer to award the eQuote in a timely manner.

Summary Approval Flow

Title:

Pre-Encumbrance Status: Not Encumbered

On Behalf Of: *

Delay Purchase Until:

Buying Entity: *

Transmit To Supplier?

My Labels:

Line Items (1) [Hide Details](#)

No.	Type	Description	Supplier Part Number	Qty	Unit	Tax	Other	Price	Amount
1		Untitled Requisition	0	1	each	\$0.00 USD	\$0.00 USD	\$0.00 USD	\$0.00000 USD

eQuote Status: Submitted - 0 of 1 Responses Received Untitled Requisition

Supplier: Equote Punchout
Location: Equote Punchout
Commodity Code: eQuote
ItemID: (no value)
WarehouseID: (no value)

Bid Number: (no value)

|

eQuote line item information such as 'Supplier' and 'Location' will be updated once the eQuote is awarded.



II. Awarding eQuotes

1. After the **'eQuote Response Due'** date has passed, click the underlined line item **'Description'** to punch out to the eQuote request.

Note: If the **'eQuote Status'** field shows that 0 responses have been received, click the **'Refresh'** button to update the field with the latest information.

The screenshot shows the 'Summary' tab of an eRequisition system. The 'Line Items' section contains one item with the following details:

No.	Type	Description	Supplier Part Number	Qty	Unit	Tax	Other	Price	Amount
1		<u>Untitled Requisition</u>	0	1	each	\$0.00 USD	\$0.00 USD	\$0.00 USD	\$0.00000 USD

Below the table, the 'eQuote Status' is shown as 'Submitted - 1 of 1 Responses Received'. The 'Refresh' button at the bottom right is circled in red. Callouts indicate that the underlined 'Description' field should be clicked to punch out to the eQuote request, and the 'Refresh' button should be used to update the 'eQuote Status' field.



2. The 'eQuote Response Summary' page will appear.

Note: The 'Details' field may have icons related to the supplier's response. The descriptions of those icons are located in the shaded legend above the responses.

- To summarily award the entire eQuote to one supplier, check the box next to the supplier and click the 'Add to eRequisition' button.
- To see a tabulation of specific responses for comparison, check the boxes next to the responses to be reviewed and click the 'Tabulate Selected' button.
- Click the 'View' button to review the supplier's specific quotes for each line item.

eQuote Response Summary

Use the legend to understand any icons that appear in the 'Details' field.

Description	
Initiator	
eQuote Title	Untitled Requisition
Date Sent	Dec 13, 2012
Response Due	Dec 19, 2012

Click 'View' to see specifics for each line item.

eQuote Responses

The symbols below refer to information suppliers included in their responses. Click on View to look at the response. Tabulate your eQuotes by clicking in the check box and then click on Tabulate Selected. You may add a checked response to eRequisition where applicable.
Note: A **Substitution** occurs when the supplier does not quote the item you requested, but instead offers a different item. An **Alternate** occurs when the supplier quotes the item you requested, and offers a similar item as an alternate choice.

Additional Response Information
 Add On Products

Terms and Conditions
 Non-Cherry-pickable

Alternate Item
 Include Attachments

View Response	Supplier Name	Received	Items Responded To	Number of Substitutions	Details	Shipping	Price of Requested and Substitute Items
<input type="checkbox"/> View	Test Vendor	Dec 13, 2012 5:19PM	2 of 2	0 of 2		Not included	200.00

Tabulate Selected
 Include Alternates in tabulation

Use the 'Tabulate Selected' button to review a tabulation of all responses.

Add To eRequisition

- d. While viewing the tabulated responses or a specific supplier's response, it is possible to award specific line items to a supplier by checking the box next to the line item and then clicking the **'Add to eRequisition'** button. This allows users to award separate line items to multiple vendors.

Note: This option is available only if the **'Non-Cherry-pickable'** icon does **not** appear in the **'Details'** section of the vendor's response. The icon represents that the supplier has indicated that they will only accept the award if all line items are awarded.

- e. Click the **'Printable Version'** button to see a text-based version of the response(s) in a pop-up window, which is formatted to print easily.
- f. Click the **'Return to Previous'** button to return to the **'eQuote Response Summary'** page.

eQuote Response Tabulation

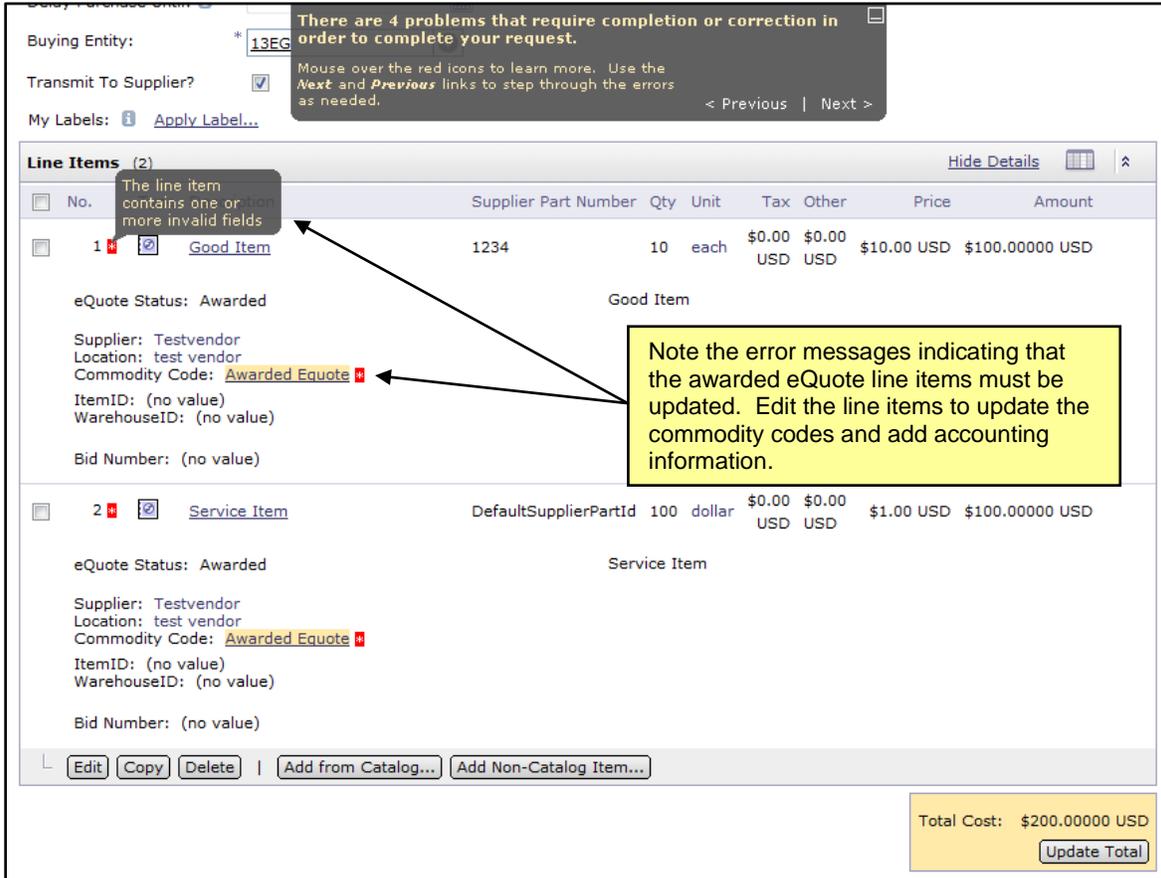
Description	
Initiator	
eQuote Title	Untitled Requisition
Date Sent	Dec 13, 2012
Response Due	Dec 19, 2012

Use the check boxes to award specific items to a supplier.

Items				
To select an item, click in the box to the left of the price. You may then add the item(s) to eRequisition where applicable. Click View to look at the supplier eQuote response individually. Click the sub and alt links next to the item price to see the supplier's item description. Note: A Substitution occurs when the supplier does not quote the item you requested, but instead offers a different item. An Alternate occurs when the supplier quotes the item you requested and offers a similar item as an alternate choice.				
View Response	Supplier Name	Shipping	Items 1 - 2 of 2	
			Good Item 10 Each	Service Item 1 Dollar
View	Test Vendor	Not included	<input type="checkbox"/> \$10.00	<input type="checkbox"/> \$100.00

[Return To Previous](#) [Add To eRequisition](#) [Printable Version](#)

- Once the 'Add to eRequisition' button has been clicked, the items will import into the eRequisition. Edit the line items to add commodity codes and accounting information before submitting the requisition.



The screenshot shows the 'Line Items' section of an eRequisition system. At the top, there is a notification: 'There are 4 problems that require completion or correction in order to complete your request.' Below this, a table lists two line items:

No.	Supplier Part Number	Qty	Unit	Tax	Other	Price	Amount
1	1234	10	each	\$0.00 USD	\$0.00 USD	\$10.00 USD	\$100.00000 USD
2	DefaultSupplierPartId	100	dollar	\$0.00 USD	\$0.00 USD	\$1.00 USD	\$100.00000 USD

Below the table, details for each item are shown. For item 1, the 'Commodity Code' is 'Awarded Equote' with a red error icon. A yellow callout box points to this field with the text: 'Note the error messages indicating that the awarded eQuote line items must be updated. Edit the line items to update the commodity codes and add accounting information.' At the bottom right, a yellow box displays 'Total Cost: \$200.00000 USD' and an 'Update Total' button.

Note: The awarded suppliers may be changed at any time before the eRequisition is fully approved by editing the requisition and punching back out to eQuote.

Note: Once the eRequisition has been fully approved and the purchase order has been sent to the supplier(s), all suppliers who received the original request will also receive an email with the bid tabulation, regardless of whether they responded or declined to respond.

Note: The eQuote bid tabulation remains linked to the eRequisition after it has been awarded. The responses can be viewed at any time for reference or audit purposes.